



ARIZONA QUALIFICATION SYSTEM

EOC / ICS ALL HAZARDS POSITION TASK BOOK FOR THE POSITION OF

PLANNING SECTION CHIEF

Version 2

Check the appropriate position type:

Type 1

Type 2

Type 3

POSITION TASK BOOK ASSIGNED TO:
CANDIDATE'S NAME:
DUTY STATION:
PHONE NUMBER:
EMAIL:
POSITION TASK BOOK INITIATED BY:
OFFICIAL'S NAME and SIGNATURE:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:
POSITION TASK BOOK WAS INITIATED:
LOCATION:
DATE:

Evaluator Verification

(Do not complete this form unless you are recommending the candidate for ***all-hazards certification.***)

FINAL EVALUATOR VERIFICATION
I verify that _____ has successfully completed all tasks as a candidate and should therefore be considered for certification in this position. I also verify that all tasks are documented with appropriate initials.
FINAL EVALUATOR'S SIGNATURE:
DATE:
FINAL EVALUATOR'S PRINTED NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:

Documentation of Agency Certification

DOCUMENTATION OF AGENCY CERTIFICATION BY THE AHJs CERTIFYING OFFICER
I certify that _____ has successfully met all of the criteria set out in the National Incident Management System (NIMS) Job Title/Position Qualifications document for the position and adhering to NIMS NQS EOC Skill Sets will hereby receive certification of his/her qualification.
OFFICIAL'S SIGNATURE:
DATE:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:

Position Task Book Overview

The Position Task Book (PTB) documents the performance criteria a candidate must meet to be certified for a position within the Arizona Qualification System (AQS). The performance criteria are associated with core NQS EOC Skill Sets and NQS PTB competencies, behaviors and tasks. This PTB covers relevant positions within all 3 EOC structures (ICS-Like, Incident Support Model, and Departmental Structure).

A candidate may not work on multiple position type PTBs for a specific position at the same time; for example, a candidate may not simultaneously work on a Type 1 Incident Commander PTB and a Type 2 Incident Commander PTB. If a position has multiple types, the candidate must, in most cases, qualify at the lowest type before pursuing the next higher type. For example, before seeking qualification for a Type 1 position, an individual must first qualify at the Type 3 level and then at the Type 2 level.

Evaluation Process

- Evaluators observe and review a candidate's completion of PTB tasks, initialing and dating each successfully completed task in the PTB.
- Evaluators complete an Evaluation Record Form after each evaluation period by documenting the candidate's performance.
- The Authority Having Jurisdiction (AHJ) may not have enough resources to ensure that every evaluator is qualified in the position being assessed. Therefore, a candidate's supervisor may evaluate the completion of PTB tasks. For example, a Logistics Section Chief has the authority to sign off on completed PTB tasks for a Food Unit Leader candidate.
- The final evaluator is a leader who verifies that a candidate has completed the PTB and met all requirements for the position. A final evaluator is generally qualified in the same position for which the candidate is applying. When possible, the evaluator and the final evaluator should not be the same person, but in situations with limited resources, the evaluator can also serve as the final evaluator.
- Once the final evaluator has completed the Final Evaluator Verification, it is forwarded to the Quality Control Officer (QCO) at DEMA along with supporting evidence that the candidate has completed all position requirements. The QCO will put the PTB and all sent documents on the QRB calendar. The QRB review will make it's recommendation to the AHJs CO. The CO in all cases will make the final determination for certification.
- After the QRB review, the AHJ Certifying Officer completes the Documentation of Agency Certification form as appropriate. That form is sent to the QCO who will issue an Arizona Gold Card credential for that individual. The Gold Card will only be issued if the QRB gave a positive recommendation.

Transferring Qualifications

- Personnel who have documentation of previous education, training, or significant on-the-job incident experience may receive credit toward qualification for a given position. Each AHJ will establish their requirements for this, usually on a case by case basis. Each AHJ establishes the requirements for transferring qualifications from another AHJ.
- If an AHJ chooses not to accept a candidate's existing certification of qualification, the candidate may be reevaluated in the specific position and issued a new PTB.
- An individual may hold multiple qualifications, such as Final Evaluator, and also hold one or more PTB credentials.
- In all cases to receive Gold Card a AQS PTB will be completed by the individual and forwarded through the AHJ's CO to the QCO to be put on the schedule for a review by the QRB.

Training Requirements

Mandatory Classes:

The following SHOULD be completed before initiation of a Position Task Book:

IS-100: Introduction to the Incident Command System (ICS)
IS-200: Basic Incident Command System for Initial Response
IS-700: NIMS: An Introduction
IS-800: National Response Framework: An Introduction
IS-2200: Basic Emergency Operations Center Functions

Foundational Classes:

Foundational Classes are a requirement for certification and credentialing. Foundational classes can be completed simultaneously while working through your PTB. Below are the required Foundational Classes:

ICS-300: Intermediate Incident Command System
ICS-400: Advanced Incident Command System
G-191: ICS/ Emergency Operations Center Interface
G-2300: Intermediate Emergency Operations Center Functions
E/L 0962 National Incident Management System Incident Command System All-Hazards Planning Section Chief Course
O-0305 United States Fire Administration (USFA) Type3 All-Hazards Incident Management Team (AHIMT)

ALL OF THE ABOVE CLASSES NEED TO BE COMPLETED WITH EVIDENCE FOR THE QRB

Attention: Reference the Resource Typing Definition for a thorough understanding of your PTB requirements at:

<https://www.fema.gov/emergency-managers/nims/components/positions>

Evaluator Verification

ANNUAL EVALUATOR VERIFICATION To verify ongoing activity towards PTB completion	
Start Date : _____	Evaluator: _____
First Year : _____	Evaluator: _____
Second Year: _____	Evaluator: _____
Third Year: _____	Evaluator: _____
Fourth Year: _____	Evaluator: _____
Fifth Year: _____	Evaluator: _____

*This Position Task Book has a currency requirement of 5 Years after the date of credentialing.

Arizona Qualification System American Disabilities Act (ADA) Compliance
<p>The Americans with Disabilities Act (ADA) and Americans with Disabilities Amendment Act (ADAA) Compliance: _____</p> <p>The Department of Emergency and Military Affairs (DEMA) Arizona Qualification System (AQS) establishes guidance and tools to assist state, local, and tribal Authority Having Jurisdiction (AHJ) in developing qualified, certified, and credentialed deployable personnel.</p> <p>Qualified individuals seeking reasonable accommodations for tasking and deployment must contact their employing AHJ. State, local, and tribal AHJ providing qualified individuals for tasking and deployments are solely responsible for processing reasonable accommodation requests in accordance with the ADA/ADAA and applicable AHJ's policies and procedures, before and during tasking and deployments.</p>

Position Task Book Competencies, Behaviors and Tasks

The PTB sets minimum criteria for certification for a position. The AHJ has the authority to add content to the baseline PTB competencies, behaviors and tasks as necessary.

The PTB covers all type levels for a given position, but an AHJ may check only one “Type” box and work on only one type at a time. (The National Incident Management System (NIMS) Job Title/Position Qualifications document describes all types.)

Command and General Staff job titles/positions qualifications are typed based on incident complexity, while all other NIMS positions are typed based on the minimum qualifications.

Definitions

Competency: An observable, measurable pattern of knowledge, skills, abilities and other characteristics an individual needs to perform an activity and its associated tasks. A competency specifies the skillset a person needs to possess to complete the tasks successfully.

Behavior: An observable work activity or a group of similar tasks necessary to perform the activity.

Task: A specific, demonstrable action necessary for successful performance in a position. Candidates must demonstrate completion of required tasks.

- Occasionally, PTB tasks are unique to one of the types; for example, certain tasks apply only to a Type 3 Incident Commander, not to a Type 2 or Type 1 Incident Commander. In those cases, the PTB indicates the corresponding type at the beginning of the task.
- **All tasks require evaluation. Bullet statements within a task are only examples and do not need to be performed to have a task signed off.**

PTB Task Codes

For each of the tasks listed in the Position Task Book (PTB), there are one or more codes describing the circumstances in which the candidate can perform tasks related to the position. If a task has multiple codes listed, it means the evaluator can assess the candidate on any of those circumstances as opposed to evaluating the candidate on all of the listed codes.

Code C: Task performed in training or classroom setting, including seminars and workshops.

Code E: Task performed on a full-scale exercise with equipment deployment under the Incident Command System (ICS).

Code F: Task performed during a functional exercise managed under the ICS.

Code I: Task performed on an incident or event managed under ICS. Examples of incidents and events that may employ ICS include but are not limited to an oil spill, search and rescue, hazardous material response, fire and emergency or non-emergency (planned or unplanned) events.

Code J: Task performed as part of day-to-day job duties.

Code T: Task performed during a tabletop exercise.

How to Complete the Evaluation Record Form

Each Evaluation Record Form (see next page) covers one evaluation period. Evaluation periods may involve incidents, classroom simulations or daily duties, depending on what the PTB recommends. The AHJ determines the number of evaluations required for position qualification and certification. If evaluators need additional evaluation periods, they can copy pages from a blank PTB and attach them to the PTB in question. Also, there are four blank Evaluation Record Forms in the back of this PTB.

Complete these items AT THE START of the evaluation period:

Evaluation Record Number: Label each evaluation record with a number to identify the incident(s), exercise(s) or event(s) during which the candidate completed the PTB tasks. The evaluator should also write this number in the PTB column labeled "Evaluation Record #" for each task performed satisfactorily. This number enables reviewers of the completed PTB to ascertain the evaluators' qualifications before signing off on the PTB.

Evaluator's name; Incident/office title and agency: List the name of the evaluator, his/her incident position or office title and the evaluator's home agency.

Evaluator's home jurisdiction address and phone: List evaluator's home jurisdiction address and phone number.

Name and location of incident or simulation/exercise or job function: Identify the name (if applicable) and location where the candidate performed the tasks.

Incident kind: Enter the kind of incident (such as hazmat, law enforcement, wildland fire, structural fire, search and rescue, flood or tornado).

Complete these items AT THE END of the evaluation period:

Number and kind of resources: Enter the number of resources assigned to the incident and their kind (such as team, personnel and equipment) pertinent to the candidate's PTB.

Evaluation period: Enter inclusive dates of candidate evaluation. This time span may cover several small, similar incidents.

Position type: Enter position type (such as Type 3, Type 2, Type 1 or Single Type).

Recommendation: Check the appropriate line and make comments below regarding the candidate's future development needs.

Additional recommendations/comments: Provide additional recommendations and comments about candidate, as necessary.

Date: List the current date.

Evaluator's initials: Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.

Evaluator's relevant qualification: List your certification relevant to the candidate position you supervised.

Evaluation Record Form

CANDIDATE NAME:
CANDIDATE POSITION:
Evaluation Record Number:
Evaluator's name:
Incident/office title and agency:
Evaluator's home jurisdiction address and phone:
Name and location of incident or simulation/exercise or job function:
Incident kind:
Number and kind of resources:
Evaluation period:
Position type:
Recommendation: The above named candidate performed the initialed and dated tasks under my supervision. I recommend the following for this candidate's further development: <input type="checkbox"/> The candidate has successfully performed all required tasks for the position. The AHJ should consider the individual for certification. <input type="checkbox"/> The candidate could not complete certain tasks or needs additional guidance. See comments below. <input type="checkbox"/> Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation. <input type="checkbox"/> The candidate is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a candidate for this position.
Additional recommendations/comments:
Date:
Evaluator's initials:
Evaluator's relevant qualification:

Planning Section Chief

1. Competency: Assume position responsibilities

Description: Successfully assume the role of Planning Section Chief and initiate position activities at the appropriate time according to the following behaviors.

1a. Behavior: Ensure readiness for assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>1. Obtain, assemble and prepare information and materials for go-kit. The kit should contain critical items for the assignment and be easily transportable:</p> <ul style="list-style-type: none"> • Supplies: <ul style="list-style-type: none"> ○ Office supplies appropriate to the function ○ Authority Having Jurisdiction (AHJ) identification badge and qualification card • Reference materials: <ul style="list-style-type: none"> ○ Functional guidelines relative to incident type (agency guidance or other functional guidelines) ○ AHJ operations guides or other operational guides ○ Position manuals • Forms: <ul style="list-style-type: none"> ○ Agency-specific forms appropriate to the function 	E, F, I		
<p>2. Obtain complete incident and logistical information:</p> <ul style="list-style-type: none"> • Incident name, number, anticipated duration, size, type, responsibilities and expectations • Reporting time and location • Transportation arrangements and travel routes • Contact procedures during travel (telephone/radio) • Expected working conditions • Personal Protective Equipment (PPE) • Security measures • Updated contact information and information links 	E, F, I		
<p>3. Arrive properly equipped at designated time and location and check in according to agency/organization guidelines:</p> <ul style="list-style-type: none"> • Arrive with go-kit and any additional equipment • Carry out check-in procedures and ensure assigned personnel do the same 	E, F, I		

1b. Behavior: Obtain information relevant to position assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>4. Receive briefing from the Incident Commander (IC) or outgoing Planning Section Chief:</p> <ul style="list-style-type: none"> • Meetings and briefings schedule • Situational assessment • Incident objectives • Strategy • Hazards to incident personnel and public • Agencies/jurisdictions involved • Organizational structure • Resources summary • Logistical needs • Ordering procedures • Incident priorities and status: life safety, incident stabilization, property and environment • Timing and scheduling • Expected products 	E, F, I		
<p>5. Obtain and review necessary documentation:</p> <ul style="list-style-type: none"> • Copy of Delegation of Authority, Letter of Expectation, Letter of Agreement or Memorandum of Understanding (MOU) • Applicable plans and reports • Directories: phone, notification • Written incident status summary • Authorizations: cell phones, rental vehicles, computers 	E, F, I		

1c. Behavior: Establish or determine organizational structure, resource and staffing needs

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>6. Evaluate staffing needs required to manage the section:</p> <ul style="list-style-type: none"> • Ensure consistency with National Incident Management System (NIMS) organizational structure • Identify training opportunities • Ensure use of established procedures for ordering resources • Request appropriate technical specialists to assist with special incident conditions 	E, F, I		
<p>7. Utilize section personnel:</p> <ul style="list-style-type: none"> • Establish appropriate organization and assign roles and responsibilities, while maintaining span of control 	E, F, I		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>8. Organize meeting and briefing locations and ensure that necessary materials are available:</p> <ul style="list-style-type: none"> • Large-scale operational planning worksheet and Incident Action Plan (IAP) safety analysis • Large-scale schematic map of incident • Large-scale charts for filling in objectives and operational rhythm/meeting schedule • Planning meeting agenda • List of incident priorities and objectives 	E, F, I		
<p>9. Work closely with Operations Section personnel to identify kind, type and number of resources required to achieve section objectives:</p> <ul style="list-style-type: none"> • Consider incident type and complexity, kinds and types of resources, resource availability and health and safety factors • Consider long-range and contingency plans and identify potential future resources 	E, F, I		
<p>10. Work closely with the Safety Officer to identify safety issues and materials for inclusion in plans.</p>	E, F, I		

2. Competency: Lead assigned personnel

Description: Influence, lead and direct assigned personnel to accomplish objectives and desired outcomes in a potentially rapidly changing environment.

2a. Behavior: Model leadership values and principles

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
11. Understand and comply with NIMS/Incident Command System (ICS) concepts and principles: <ul style="list-style-type: none"> • Establish and modify an effective organization based on changing incident and resource conditions • Maintain appropriate span of control • Act as a representative of incident leadership 	E, F, I		
12. Create a positive work environment: <ul style="list-style-type: none"> • Communicate leader's intent and guidance • Manage section and its activities effectively • Proactively assume responsibility for the section and initiate action 	E, F, I		
13. Exhibit principles of duty, respect and integrity as a leader.	C, E, F, I, J, T		
14. Establish and maintain positive interpersonal and interagency working relationships: <ul style="list-style-type: none"> • Understand scope, roles, responsibilities, jurisdiction and authority of responding agencies 	E, F, I		

2b. Behavior: Communicate incident priorities and supervise personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
15. Communicate with assigned personnel: <ul style="list-style-type: none"> • Communicate priorities, objectives, strategies and any changes • Inform personnel of their assigned tasks and expectations • Clearly explain conflict resolution procedures and ensure that personnel understand • Ensure that assigned objectives and expectations for the operational period are reasonable and accurate 	E, F, I		
16. Ensure that staff follows all applicable agency/jurisdiction policies, contracts, standard operating procedures and agreements: <ul style="list-style-type: none"> • Federal, state, local, tribal, territorial and regional relationships, as appropriate • Roles and responsibilities of potential responder agencies • Scope, jurisdiction and authority of potential responder agencies' contingency plans 	E, F, I		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
17. Supervise and hold personnel accountable for executing assigned tasks: <ul style="list-style-type: none"> Identify and promptly resolve disagreements, issues and misunderstandings Prioritize work while considering immediate support for incident operations 	E, F, I		
18. Ensure debriefings occur and participate as necessary: <ul style="list-style-type: none"> Ensure incident situation status information is current and complete 	E, F, I		

2c. Behavior: Ensure the health, safety, welfare and accountability of assigned personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
19. Evaluate mental and physical fatigue of assigned personnel: <ul style="list-style-type: none"> Ensure adequate rest is provided to section personnel 	E, F, I		
20. Recognize potentially hazardous situations, inform assigned personnel of hazards and take precautions to mitigate risk: <ul style="list-style-type: none"> Adjust operations in response to hazards, weather and other relevant events 	E, F, I		
21. Demonstrate knowledge of and comply with relevant health and safety requirements: <ul style="list-style-type: none"> Direct and oversee section operations to ensure compliance with health and safety considerations and guidelines Coordinate with the Safety Officer to ensure that assigned personnel follow safety guidelines 	E, F, I		
22. Report or explain the procedures for reporting unexpected occurrences, such as fire, death, injury, illness, exposure to pathogens or hazardous materials (HAZMAT), accident, political contact or property loss or damage: <ul style="list-style-type: none"> Ensure report contains nature of event, location, magnitude, personnel involved and initial action taken (such as helicopter picking up injured or an appropriate subsequent action) Ensure the protection of Personally Identifiable Information (PII) while reporting Obtain information from the following sources regarding special hazards, threats or unexpected occurrences: subordinates, personal observation, other incident personnel and off-incident personnel 	E, F, I		

2d. Behavior: Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
23. Demonstrate the ability to identify opportunities for universal accessibility.	E, F, I, J		
24. Demonstrate the ability to assess and monitor for physical access, programmatic access and effective communications access.	E, F, I, J		
25. Provide equal access, disability accommodations and access and functional needs (AFN) accommodations.	E, F, I, J		

3. Competency: Conduct operations and ensure completion of assigned tasks

Description: Identify, analyze and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established time frame.

3a. Behavior: Set the section priorities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
26. Attend and participate in strategy meetings as necessary: <ul style="list-style-type: none"> • Assess organizational needs • Identify additional resource needs • Identify critical factors to ensure section success • Prioritize incident and section objectives 	E, F, I		
27. Disseminate priorities and expected completion timelines to staff.	E, F, I		
28. Analyze work assignments and staffing levels to ensure achievement of section objectives.	E, F, I		
29. Hold staff accountable for communicated priorities and deadlines.	E, F, I		

3b. Behavior: Develop and implement plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
30. Facilitate and participate in the planning process: <ul style="list-style-type: none"> • Prepare for and participate in planning meetings • Assist in the development of plans, as necessary: <ul style="list-style-type: none"> ○ Long-range ○ Strategic ○ Contingency ○ Demobilization ○ Continuity of Operations Plan (COOP) 	E, F, I		
31. Review, validate and modify plans: <ul style="list-style-type: none"> • Analyze alternate strategies and explain decisions • Validate or revise section objectives • Review information covering health and safety principles, known hazards and importance of all periods • Validate section organizational structure • Validate section resource assignments • Review reserve resources • Evaluate immediate support needs 	E, F, I		
32. Approve completed plans: <ul style="list-style-type: none"> • Ensure plans are complete, accurate, realistically attainable and relevant to the incident objectives 	E, F, I		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
33. Coordinate submission of incident status summary: <ul style="list-style-type: none"> • Ensure that it is accurate and complete • Include priorities and special considerations • Abide by established time frames • Include IC's signature 	E, F, I		
34. Coordinate with Command and General Staff to identify the need for contingency plans: <ul style="list-style-type: none"> • Severe weather • "Incident within an incident" • Evacuation 	C, E, F, I, J		

3c. Behavior: Coordinate with all appropriate personnel and stakeholders

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
35. Establish effective relationships with stakeholders and partners in the impacted jurisdiction(s).	E, F, I		
36. Establish effective relationships and coordinate with incident personnel: <ul style="list-style-type: none"> • IMT personnel • Other supporting personnel 	E, F, I		

3d. Behavior: Apply agency policy, contracts and agreements

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
37. Demonstrate knowledge of and apply relevant legal, regulatory and fiscal constraints.	E, F, I		
38. Complete all work according to organization/agency direction, policy and incident objectives: <ul style="list-style-type: none"> • Ensure that personnel complete all documentation requirements according to organization/agency direction, policy and incident objectives 	E, F, I		

3e. Behavior: Make appropriate decisions based on evaluation of gathered information, risks and incident situation and use information to produce outputs and modify approach

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>39. Evaluate special conditions, existing or predicted, that require technical expertise:</p> <ul style="list-style-type: none"> • Hazards • Reconnaissance • Objectives • Access/egress • Values to be protected • Evacuation/sheltering potential • Communications • Organizational structure • Tactical coordination • Weather and topography • Responder fatigue • Logistical considerations • Jurisdictional responsibilities • Span of control 	E, F, I		

3f. Behavior: Ensure documentation is complete

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>40. Review documents for accuracy, timeliness and appropriate distribution.</p>	E, F, I		
<p>41. Maintain and collect personal records related to incident:</p> <ul style="list-style-type: none"> • Time sheets • Rental records • Accident forms • Property records <ul style="list-style-type: none"> ○ Equipment time records • Receipts 	E, F, I		
<p>42. Maintain and submit incident records for events, personnel, equipment, supplies and other data for incident management needs:</p> <ul style="list-style-type: none"> • Property loss/damage reports • Agency-required incident reports • Activity log • Changes in strategy and tactics 	E, F, I		
<p>43. Ensure all units that handle data or intelligence are aware of and maintain a document security plan to manage the confidentiality and security of any classified, confidential, sensitive and For Official Use Only (FOUO) documentation, intelligence, data or incident information</p>	E, F, I		

3g. Behavior: Establish work assignments and performance expectations, monitor performance and provide feedback

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>44. Supervise or ensure completion of the duties of a Demobilization Unit Leader:</p> <ul style="list-style-type: none"> • Review incident resource records to determine likely size and extent of the demobilization effort and request personnel, workspace and supplies as necessary • Obtain IC demobilization objectives and priorities • Evaluate logistics and transportation capabilities to support demobilization • Develop demobilization plan • Implement and monitor the demobilization process 	E, F, I		
<p>45. Supervise or ensure completion of the duties of a Documentation Unit Leader:</p> <ul style="list-style-type: none"> • Coordinate with functional areas for the collection of incident documentation • Establish duplication service and respond to requests • Maintain, safeguard and securely store incident records • Provide incident documentation per document security guidelines, as requested • Organize files in preparation for submitting final incident documentation package 	E, F, I		
<p>46. Supervise or ensure completion of the duties of a Resources Unit Leader:</p> <ul style="list-style-type: none"> • Establish and monitor the check-in function at incident locations • Provide resource status data as requested • Maintain and post the current status and location of all resources • Maintain master roster of all resources checked in at the incident • Continually identify surplus resources • Assemble and review draft IAP 	E, F, I		
<p>47. Supervise or ensure completion of the duties of a Situation Unit Leader:</p> <ul style="list-style-type: none"> • Collect and analyze incident data • Prepare, post or disseminate resource and situation status information as required, including special requests • Provide photographic services, charts, image overlays and maps • Collect, process, organize and disseminate incident information relating to status of current operations, incident growth, mitigation or intelligence activities • Conduct situation briefings at meetings and briefings 	E, F, I		

3h. Behavior: Facilitate planning process

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>48. Facilitate planning meetings and share pertinent information:</p> <ul style="list-style-type: none"> • Expected duration • Changes in objectives or strategies • Approval of IAP • Additional responsibilities • Changes in jurisdictional involvement 	E, F, I		
<p>49. Schedule and facilitate operational briefings:</p> <ul style="list-style-type: none"> • Clearly post the location and time of the operational briefing • Emphasize any changes from the written IAP 	E, F, I		
<p>50. Inform identified attendees of planning meeting time, location and information expected of them:</p> <ul style="list-style-type: none"> • Define meeting objectives, agenda and time expectations • Post agenda at appropriate locations 	E, F, I		
<p>51. Ensure presenters understand and adhere to their roles and responsibilities during meetings and briefings:</p> <ul style="list-style-type: none"> • Operational briefings • Tactics meetings • Planning meetings • Strategy meetings • Command and General Staff meetings 	E, F,		
<p>52. Ensure planning staff completes or supports completion of other relevant plans within required time frames:</p> <ul style="list-style-type: none"> • Contingency plan(s) as necessary, such as plans for evacuation/sheltering and structure protection • Demobilization plan • Transfer of command plan 	E, F, I		

3i. Behavior: Develop and implement IAP

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>53. Ensure that personnel complete and compile elements of the IAP within appropriate time frames:</p> <ul style="list-style-type: none"> • Obtain elements from other relevant sections • Assemble the elements into an IAP • Ensure that the IAP links objectives with strategies and tactics • Obtain IAP information from all positions, contributing components, forms and data • Obtain the IC's approval and signature on IAP • Identify the number of IAP copies necessary • Check IAP content for completeness and accuracy • Ensure distribution of IAP copies 	E, F, I		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
54. Execute forecasting for future operational periods and prepare reports.	E, F, I		
55. Lead the completion of a situation report and distribute it to staff according to guidelines and procedures.	E, F, I		
56. Ensure the creation of mapping products and visual aids with all facilities and other incident-related markers labeled: <ul style="list-style-type: none"> • Situation Unit map • IAP map • Operational briefing map • Transportation map • Facilities map • Progression map • Other incident-specific maps and charts 	E, F, I		
57. Establish and maintain the incident meeting schedule: <ul style="list-style-type: none"> • Publish and post the meeting schedule at appropriate locations • Distribute meeting schedule to IC, Command and General Staff and other appropriate personnel • Facilitate meetings and briefings during the planning cycle • Monitor meeting and briefing times and locations 	C, E, F, I		
58. Monitor and evaluate the effectiveness of the planning cycle and suggest modifications when necessary: <ul style="list-style-type: none"> • Adjust meeting and briefing times and locations, as necessary 	E, F, I		

4. Competency: Communicate effectively

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a potentially rapidly changing environment.

4a. Behavior: Ensure the exchange of relevant information during briefings

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
59. Prepare for and participate in briefings: <ul style="list-style-type: none">• Ensure briefings are accurate, timely and include appropriate personnel• Brief external support organizations• Share and evaluate information	E, F, I		
60. Lead staff briefings and debriefings.	E, F, I		

5. Competency: Prepare for demobilization/transfer

Description: Demobilize position and transfer position duties.

5a. Behavior: Transfer position duties while ensuring continuity

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
61. Complete the process for demobilizing position responsibilities: <ul style="list-style-type: none"> • Brief and provide complete and accurate records to relief personnel • Discuss equipment release considerations • Provide information to supervisor to assist with decisions on release priorities • Coordinate with appropriate partners regarding demobilization procedures • Brief personnel on demobilization responsibilities • Ensure personnel demobilize in a timely and complete manner • Emphasize safety and accountability during this phase of operations 	C, E, F, I, J, T		
62. Coordinate an efficient transfer of position duties when deactivating or demobilizing resources: <ul style="list-style-type: none"> • Inform assigned personnel • Notify incoming personnel when and where transition of positions will occur • Conduct transition effectively • Document follow-up action and submit to agency representative 	E, F, I		
63. Complete all necessary reports and narratives following common standards before turnover: <ul style="list-style-type: none"> • Activity log • Shift change • End of operational period • Reassignment • Deactivation/demobilization 	E, F, I		
64. Participate in transition or incident closeout: <ul style="list-style-type: none"> • Conduct debriefings with agency administrator(s) as requested • Close out incident as appropriate for the AHJ 	E, F, I		

5b. Behavior: Plan for demobilization and ensure staff follow demobilization process

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>65. Direct development of, support for, approval of and implementation of the demobilization plan:</p> <ul style="list-style-type: none"> • Coordinate with appropriate partners regarding demobilization procedures • Coordinate needs and responsibilities 	E, F, I		
<p>66. Coordinate with relevant entities to develop and implement the incident demobilization plan:</p> <ul style="list-style-type: none"> • Consider demobilization early in the incident • Coordinate with Demobilization Unit and with Command and General Staff • Coordinate with local agencies concerning functional demobilization procedures • Brief staff on demobilization responsibilities • Ensure section demobilizes in a timely and complete manner • Emphasize safety and accountability during demobilization phase 	E, F, I		
<p>67. Facilitate host agency administrator closeout/After Action Review (AAR).</p>	E, F, I		

Emergency Operations Center Skillsets

Emergency Operations Center Skillsets have many tasks that are interchangeable with the tasks on the previous pages. Duplicated tasks have been grayed out. All remaining tasks must be completed.

Duplicated tasks are kept in this PTB as evidence supporting the collaboration and alignment with the FEMA EOC Skillsets. These requirements have been met through the completion of previous tasks within this PTB.

NOTE:

Grayed out tasks are marked in the Evaluator Record # and Initials/Date Column.

Emergency Operations Center (EOC) Skillset: Action Tracking

Task Categories:

Perform action tracking

Task Category: Perform action tracking

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Collect and track open tasks, issues and action items through resolution.	E, F, I		
2. Communicate about tasks, issues, and action items horizontally and vertically as necessary to create awareness and ensure completion.	E, F, I		

Emergency Operations Center (EOC) Skillset: Coordination and Individual Contribution

Task Categories:

Complete common coordination and accountability tasks associated with all positions within the EOC

Task Category: Complete common coordination and accountability tasks associated with all positions within the EOC

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate understanding of EOC activation and operations, including how your function relates to other incident support activities: <ul style="list-style-type: none"> Demonstrate general awareness of local risks and hazards 	C, E, F, I, T	Option: Code C IS-2200	
2. Maintain positive, calm demeanor to promote a positive work environment.	E, F, I		
3. Demonstrate effective communication skills, such as the ability to translate technical jargon into plain language.	E, F, I, J,		
4. Comply with relevant health and safety requirements.	E, F, I		
5. Demonstrate understanding of EOC Continuity of Operations (COOP), succession, emergency procedures, and safety guidelines.	C, E, F, I, T	Option: Code C G-2300	
6. Participate in the EOC planning process.	E, F, I		
7. Participate in appropriate EOC meetings and briefings related to your assigned function.	E, F, I		
8. Follow general internal and external information flow processes: <ul style="list-style-type: none"> Demonstrate knowledge of information management systems, such as incident management software 	E, F, I,		
9. Manage essential elements of information and critical information requests in accordance with processes and procedures: <ul style="list-style-type: none"> Follow EOC approval authorities Properly handle Personally Identifiable Information (PII) and sensitive information Provide proper documentation for record-keeping and accountability Provide information for reports and leadership decisions 	E, F, I,		
10. Practice proper knowledge management processes and procedures: <ul style="list-style-type: none"> File structures Naming conventions Archiving processes Position logs 	E, F, I		
11. Follow processes for resource requests, prioritization, deployment, tracking, reassignment, and demobilization.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Participate in orderly transition of resources and processes from response to recovery.	E, F, I		
13. Transfer responsibilities upon completion of assignment: <ul style="list-style-type: none"> • Transfer to replacement, recovery personnel, or other responsible party • If necessary, shift responsibilities to a non-disaster/day-to-day job 	E, F, I		
14. Participate in EOC training and exercises.	E, F		
15. Participate in after action review and improvement planning.	E, F, I, T		

Emergency Operations Center (EOC) Skillset: Center Management

Task Categories:

Establish EOC support for incident/event

Coordinate EOC activities

Ensure proper support for resource needs and requests, including allocation and tracking

Ensure development and coordination of plans

Ensure collection, analysis, and sharing of information internally and externally

Task Category: Establish EOC support for incident/event

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Open/activate EOC and initiate EOC personnel notification: <ul style="list-style-type: none"> • Initiate EOC alert and activation procedures • Determine activation level and necessary staffing based on initial information gathering and established guidelines/plans • Coordinate with EOC facility management to ensure the EOC infrastructure is operational and determine personnel support needs 	E, F, I		
2. Establish and maintain communications with incident command, local EOC, and other function-specific operations, such as public health, to clarify roles and responsibilities and discuss support requirements: <ul style="list-style-type: none"> • Discuss incident support requirements to clarify scope of incident command responsibilities versus EOC responsibilities • Obtain initial situation information 	E, F, I		
3. Identify and prioritize positions based on the nature of the incident/activation and available resources: <ul style="list-style-type: none"> • Consider: <ul style="list-style-type: none"> ○ Consequence management beyond immediate response impacts ○ EOC's role in relation to the incident, such as operational, coordination, or support • Establish process for resource requests for operational planning purposes 	E, F, I		
4. Evaluate the need for collaboration with outside organizations to meet incident needs: <ul style="list-style-type: none"> • Engage partner organizations 	E, F, I, T		
5. Ensure EOC facility management and safety personnel establish processes and procedures to promote the health, safety, and welfare of EOC personnel	E, F, I		

Task Category: Coordinate EOC activities

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
6. Direct and coordinate EOC personnel: <ul style="list-style-type: none"> • Ensure staff accountability for decisions and actions within their functional area. • Ensure staff accountability for interactions and coordination with other functional areas. • Ensure that EOC leaders consistently and effectively work together to manage incident support. 	E, F, I		
7. Ensure that EOC objectives and/or strategies for the operational period are reasonable, accurate, and consistent with incident objectives	E, F, I		
8. Supervise and adjust EOC organization and operations as necessary, based on changes in incident situation and resource status: <ul style="list-style-type: none"> • Communicate priorities and strategies throughout the EOC • Establish and maintain health and safety procedures throughout the EOC • Use and coordinate all assigned resources effectively • De-conflict procedures and objectives of organizational elements • Establish operational rhythm and daily briefing/debriefing schedule with EOC leaders 	E, F, I		
9. Ensure staff actions are appropriate based on analyzed and validated information: <ul style="list-style-type: none"> • Make adjustments in response to new information, changing conditions, or unexpected obstacles • Identify and resolve problems that could affect the outcome of the incident: <ul style="list-style-type: none"> ○ Public messaging ○ Political issues ○ Conflicting objectives 	E, F, I		
10. Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities	E, F, I		
11. Ensure that operations consider socioeconomic, political, and cultural aspects	E, F, I		
12. Ensure EOC actions support recovery efforts: <ul style="list-style-type: none"> • Ensure staff identify and execute initial recovery tasks • Plan for and make necessary EOC decisions concerning recovery • Ensure transition of recovery tasks 	E, F, I		
13. Ensure financial management for jurisdictional activities: <ul style="list-style-type: none"> • Consider reimbursement-related record keeping requirements • Advise executives on financial matters related with jurisdictional activities, as necessary 	E, F, I		
14. Ensure availability of legal advice relating to EOC activities.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
15. Support process improvement activities: <ul style="list-style-type: none"> • Ensure personnel collect and analyze information regarding EOC activation and activities • Enable staff to suggest process improvements and solutions during EOC operations • Support process/performance improvement following EOC deactivation 	E, F, I		
16. Ensure personnel complete incident documentation and appropriate administrative requirements, such as: <ul style="list-style-type: none"> • Incident forms, including activity logs per operational period • EOC action plan, in preparation for next operational period 	E, F, I		
17. Ensure resource and financial paperwork meets reimbursement criteria: <ul style="list-style-type: none"> • Personnel equipment and time records • Other reimbursement requirements 	E, F, I		
18. Ensure personnel appropriately handle classified or restricted information, such as: <ul style="list-style-type: none"> • Personally Identifiable Information (PII) • Health Insurance Portability and Accountability Act (HIPAA) • For Official Use Only (FOUO) 	E, F, I, J		
19. Plan for deactivation and ensure that staff follow deactivation procedures	E, F, I		

Task Category: Ensure proper support for resource needs and requests, including allocation and tracking

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
20. Forecast resource needs based on analysis of incident potential: <ul style="list-style-type: none"> • Understand relevant external resource sources, such as Federal, state, mutual aid, and contracting 	E, F, I, T		
21. Ensure the proper receipt and assignment of resource requests: <ul style="list-style-type: none"> • Demonstrate familiarity with process for requesting or mobilizing resources through EMAC and/or other mutual aid systems • Demonstrate familiarity with process for requesting resources from state or Federal governments • Demonstrate familiarity with process for requesting resources from the private sector and not-for-profit organizations 	E, F, I		
22. Operate, develop, or maintain a resource ordering and tracking system: <ul style="list-style-type: none"> • Establish or verify a process for tracking resource requests made to or by the EOC 	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
23. Ensure personnel properly manage requests for assistance: <ul style="list-style-type: none"> • Prioritize requests • Prioritize resources to fulfill requests • Coordinate with other responding organizations, such as neighboring jurisdictions • Properly assign tasks to the appropriate staff or representing agency • Consider logistical and financial constraints 	E, F, I		

Task Category: Ensure development and coordination of plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
24. Develop clear and concise EOC objectives and/or strategies commensurate with available resource and incident objectives: <ul style="list-style-type: none"> • Ensure they are measurable and attainable • Ensure they meet Policy Group’s direction • Monitor incident status and priorities and develop alternate strategies when necessary 	E, F, I		
25. Ensure development of an EOC action plan, considering the following: <ul style="list-style-type: none"> • Size and complexity of incident • Incident agency/organization policies and procedures • Time frames and schedules • Job performance expectations • Supported agency expectations and needs 	E, F, I		
26. Ensure preparation of EOC action plan for the next operational period: <ul style="list-style-type: none"> • Determine objectives for next operational period • Review and approve tasks and work assignments for next operational period • Advise on current capabilities and limitations • Determine resource needs or excess • Approve EOC action plan 	E, F, I		
27. Ensure development of appropriate contingency plans and future plans (more than one operational period in the future).	E, F, I		
28. Monitor implementation of plans.	E, F, I		

Task Category: Ensure collection, analysis, and sharing of information internally and externally

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
29. Establish and continuously validate critical information requirements: <ul style="list-style-type: none"> • Establish essential elements of information and how they will be shared, including key resource status 	E, F, I		
30. Ensure personnel initiate, regularly produce, and disseminate situation reports: <ul style="list-style-type: none"> • Recognize when to initiate a situation report and what to include in the report • Approve situation report before dissemination • Ensure staff distribute situation reports to appropriate recipients 	E, F, I		
31. Ensure staff gather and analyze information on current and changing situations to determine action: <ul style="list-style-type: none"> • Ensure close coordination with on-scene personnel 	E, F, I		
32. Communicate with Federal, state, tribal, or local agencies, such as emergency management or Homeland Security: <ul style="list-style-type: none"> • Share status of key resources 	E, F, I		
33. Provide appropriate information to elected officials and senior leaders: <ul style="list-style-type: none"> • Identify reporting requirements from senior officials and Policy Group • Ensure the development of briefing materials for executives • Advise Policy Group on: <ul style="list-style-type: none"> ○ Creating or amending policies ○ Enacting emergency protective measures ○ Allocating scarce resources ○ Strategic-level guidance ○ Policy-level outreach actions 	E, F, I		
34. Transmit Policy Group and leadership direction within the EOC organization.	E, F, I		
35. Work with Public Affairs to determine appropriate public outreach methods for the incident: <ul style="list-style-type: none"> • Consider: <ul style="list-style-type: none"> ○ Partnering with a call center ○ Using social media, media interviews, press releases, and public meetings • Present a knowledgeable and credible image to the public and the media 	E, F, I		
36. Ensure public information coordination with other incident public information personnel: <ul style="list-style-type: none"> • Evaluate the need to establish a Joint Information System (JIS) and Joint Information Center (JIC) 	E, F, I		
37. Ensure a there is a method to disseminate public information and warning.	E, F, I, J		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>38. Review and approve information releases:</p> <ul style="list-style-type: none"> • Follow established information protocol for information releases • Ensure that releases are timely and accurate • Develop public messages with the Public Information Officer (PIO) or public affairs function, as necessary 	E, F, I		
<p>39. Ensure information is communicated horizontally within the EOC:</p> <ul style="list-style-type: none"> • Ensure EOC functions coordinate and share relevant information • Ensure leaders share information with their teams and across teams 	E, F, I		

Emergency Operations Center (EOC) Skillset: Document and Records Management

Task Categories:

Collect and store documents and records

Provide documents and records upon request

Task Category: Collect and store documents and records

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Follow document and records management procedures and policies.	E, F, I		
2. Brief EOC personnel on document management processes and related staff responsibilities.	E, F, I		
3. Monitor, review, and assess activity logs, charts, and records for completeness and follow up on any that are incomplete.	E, F, I		
4. Collect and package information for after action review.	E, F, I		

Task Category: Provide documents and records upon request

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
5. Monitor compliance with jpf information management processes and procedures.	E, F, I		
6. Perform real-time documentation collection and storage.	E, F, I		
7. Archive documents such as activity logs, charts, and records.	E, F, I		
8. Respond to internal requests for archived information, such as: <ul style="list-style-type: none"> • Lessons learned from past disasters, incidents, and events • Previous incident information 	E, F, I		

Emergency Operations Center (EOC) Skillset: Legal Counseling

Task Categories:

Advise EOC leadership and staff on legal matters and provide other legal services

Task Category: Advise EOC leadership and staff on legal matters and provide other legal services

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of relevant laws, ordinances, regulations, authorities, and policies at local, state, tribal, territorial, and Federal levels.	E, F, I, J		
2. Demonstrate knowledge of local, state, tribal, territorial, and Federal procurement laws and procedures.	E, F, I, J		
3. Demonstrate knowledge of mutual aid agreements, Memorandums of Understanding (MOU), and Memorandums of Agreement (MOA).	E, F, I, J		
4. Brief or inform EOC personnel about legal advice available to guide EOC activities.	E, F, I		
5. Provide or arrange for legal advice relating to EOC activities.	E, F, I		
6. Provide guidance to senior leadership, Policy Group, and EOC personnel on potential legal risks and liabilities: <ul style="list-style-type: none"> • Establish working relationships, including with external legal partners and subject matter experts • Anticipate potential legal problems and facilitate their resolution 	E, F, I		
7. Coordinate with local, state, tribal, territorial, and Federal emergency management attorneys.	E, F, I, J		
8. Draft proclamations, declarations, emergency ordinances, and other legal documents in coordination with EOC leadership and local, state, tribal, territorial, and Federal officials.	E, F, I, J		

Emergency Operations Center (EOC) Skillset: Organizational Representation

Task Categories:

Represent your organization and support EOC activities

Understand discipline-specific resource streams

Task Category: Represent your organization and support EOC activities

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate subject matter expertise related to the organization you represent.	E, F, I, J, T		
2. Demonstrate understanding of your organization's policies, plans, resources, and constraints.	E, F, I, J, T		
3. Demonstrate ability to reach back to your organization and commit resources.	E, F, I		
4. Evaluate and monitor the situation and advise supervisor and other appropriate personnel: <ul style="list-style-type: none"> • Identify problems and recommend solutions • Provide essential elements of information to those serving in a situational awareness function • Provide information to represented organization and third parties • Demonstrate ability to forecast resource needs, potential consequences, and cascading effects of action or inaction 	E, F, I		
5. Proactively coordinate with other organizational representatives on issues such as: <ul style="list-style-type: none"> • Shared resources • Cascading effects on organizations • Efficiency of assistance • Resource availability 	E, F, I, T		
6. Brief relevant audiences on represented organization's issues related to the incident.	E, F, I		
7. Represent the organization in the planning process.	E, F, I		
8. Communicate back to your organization to share situational awareness.	E, F, I		

Task Category: Understand discipline-specific resource streams

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
9. Track organizational resources, associated costs, and logistical concerns.	E, F, I		
10. Follow the EOC's process for providing your organization's resources.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
11. Initiate resource requests on behalf of your organization: <ul style="list-style-type: none">• Understand organizational Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), existing contracts, and discipline-specific state and Federal support	E, F, I		

Emergency Operations Center (EOC) Skillset: Leadership

Task Categories:

Be proficient in the job, both technically and as a leader

Supervise staff to ensure understanding and accomplishment of duties and tasks

Coordinate to foster unity of effort

Task Category: Be proficient in the job, both technically and as a leader

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Exhibit principles of duty, respect, and integrity by, for example: <ul style="list-style-type: none"> • Making sound and timely decisions • Seeking and accepting responsibility for actions 	E, F, I		
2. Demonstrate understanding of EOC and Policy Group roles, responsibilities, and authorities: <ul style="list-style-type: none"> • Describe how this mission may change in a different organization, jurisdiction, or operating environment 	E, F, I, J, T		
3. Demonstrate understanding of external sources of assistance: <ul style="list-style-type: none"> • What resources could be available • When they could become available • How to acquire them • Necessary approvals 	E, F, I, J, T		
4. Communicate vertically and horizontally to facilitate and inform decision-making: <ul style="list-style-type: none"> • Communicate options, considerations, and recommendations • Keep subordinates informed 	E, F, I		
5. Help develop strategies and tasks to support the goals and objectives of incident command or the EOC.	E, F, I		
6. Obtain relevant information for operational decisions.	E, F, I		
7. Guide personnel as they identify and address gaps in critical information.	E, F, I		
8. Establish metrics and benchmarks for program performance and monitor progress through completion.	E, F, I, J		
9. Monitor and manage stakeholder expectations: <ul style="list-style-type: none"> • Communicate policy, process, and procedural changes 	E, F, I		
10. Order and organize resources to achieve objectives: <ul style="list-style-type: none"> • Understand constraints and limitations 	E, F, I, J		
11. Continuously evaluate EOC processes, procedures, and priorities: <ul style="list-style-type: none"> • Coordinate with performance improvement personnel 	E, F, I, T		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Suggest ways to improve processes and procedures, and then help implement improvements: <ul style="list-style-type: none"> • Facilitate conversations about process performance • Assess processes • Determine gaps • Take steps for improvement 	E, F, I		

Task Category: Supervise staff to ensure understanding and accomplishment of duties and tasks

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
13. Use leadership styles appropriate to the situation.	E, F, I		
14. Establish and communicate processes and procedures.	E, F, I		
15. Assign tasks and clearly communicate expectations.	E, F, I		
16. Emphasize and foster teamwork.	E, F, I		
17. Manage conflict and coordinate problem-solving: <ul style="list-style-type: none"> • Manage conflicting viewpoints • Assess alternative courses of action • Determine and communicate a way forward • Ensure follow-through and escalate to appropriate level as necessary 	E, F, I		
18. Prepare and discuss feedback with subordinates: <ul style="list-style-type: none"> • Monitor performance and discuss task understanding • Evaluate performance and complete personnel performance evaluations 	E, F, I		
19. Support the health, safety, and welfare of assigned personnel: <ul style="list-style-type: none"> • Direct operations based on health and safety considerations and guidelines • Ensure that personnel follow safety guidelines appropriately • Spot-check operations to ensure compliance with safety guidelines • Make resources available to support staff health and safety • Monitor staff for mental and physical fatigue 	E, F, I		

Task Category: Coordinate to foster unity of effort

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
20. Establish and maintain positive interpersonal and interorganizational working relationships.	E, F, I, J		
21. Demonstrate ability to influence others outside your chain of command.	E, F, I, J		
22. Ensure staff activities align with the EOC's operational rhythm.	E, F, I		

Emergency Operations Center (EOC) Skillset: Performance Improvement

Task Categories:

Collect and analyze information regarding EOC activation and activities

Suggest process improvements and solutions during EOC operations

Support process improvement following EOC deactivation

Task Category: Collect and analyze information regarding EOC activation and activities

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of the after action review and improvement planning process, including the types of information gathered and the feedback process.	E, F, I, J, T		
2. Collect, store, and analyze data for the after action review and improvement plan.	E, F, I		
3. Perform real-time data collection during response: <ul style="list-style-type: none"> • Use accepted tools, such as EOC activity logs 	E, F, I		
4. Provide guidance to EOC leadership on collecting performance improvement-related data.	E, F, I		

Task Category: Suggest process improvements and solutions during EOC operations

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
5. Identify best practices and areas for improvement during EOC activation, operation, and deactivation, and suggest process improvement measures to EOC staff and leadership.	E, F, I		
6. Provide recommendations to leadership for approval and dissemination.	E, F, I, J		

Task Category: Support process improvement following EOC deactivation

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
7. Develop an after action review and improvement planning schedule for the EOC activation that is consistent with Homeland Security Exercise and Evaluation Program (HSEEP) or similar guidance.	E, F, I		
8. Coordinate after action review-related meetings to identify and clarify areas for improvement. <ul style="list-style-type: none"> • Support facilitation of meetings as necessary 	E, F, I, J		
9. Identify best practices and areas for improvement.	E, F, I, J		
10. Develop recommendations to address areas for improvement.	E, F, I, J		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
11. Coordinate EOC after-action report development efforts with other incident-related after-action reporting efforts.	E, F, I		

Emergency Operations Center (EOC) Skillset: Planning

Task Categories:

Reference pre-incident plans

Develop and write EOC action plans and other incident-specific plans

Disseminate plans

Facilitate the ongoing planning process

Task Category: Reference pre-incident plans

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Gather relevant pre-incident plans, best practices, lessons learned, etc. from internal and external sources: <ul style="list-style-type: none"> • Obtain additional plans from stakeholders and partners 	E, F, I, J		
2. Obtain additional plans or supporting documents, such as annexes and standard operating procedures, as necessary.	E, F, I		
3. Identify areas where EOC personnel may need to develop plans or supporting documents.	E, F, I		

Task Category: Develop and write EOC action plans and other incident-specific plans

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
4. Demonstrate knowledge of the EOC planning process: <ul style="list-style-type: none"> • Iterative action plan development • Development of other incident-specific plans 	E, F, I, T		
5. Facilitate the development of objectives and/or strategies to achieve desired outcomes: <ul style="list-style-type: none"> • Ensure integration of incident command objectives, priorities, and senior leadership guidance into EOC planning 	E, F, I		
6. Facilitate the assessment and revision of objectives and/or strategies to ensure that they align with desired outcomes.	E, F, I		
7. Establish communication with stakeholders to facilitate planning and problem-solving: <ul style="list-style-type: none"> • Understand and address stakeholder expectations • Incorporate nontraditional planning partners as necessary 	E, F, I		
8. Write or review incident-specific plans: <ul style="list-style-type: none"> • With direction from EOC leadership, lead and implement the EOC planning process • Use appropriate formats, graphics, and maps • Oversee production of other incident-specific plans 	E, F, I		
9. Demonstrate knowledge of operational planning and continuity planning: <ul style="list-style-type: none"> • Develop plans to address specific situations or needs 	E, F, I, J, T		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
10. Seek and obtain approval for incident-specific plans.	E, F, I		
11. Monitor implementation of plans and adjust as necessary.	E, F, I		

Task Category: Disseminate plans

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Provide plans to internal and external stakeholders for implementation and awareness.	E, F, I		
13. Ensure that stakeholders are familiar with the contents, roles, responsibilities, and timelines of relevant plans.	E, F, I		

Task Category: Facilitate the ongoing planning process

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
14. Implement EOC operational rhythm, as approved by EOC leadership: <ul style="list-style-type: none"> • Coordinate the EOC planning cycle with field, Joint Information Center (JIC), Joint Information System (JIS), and other incident operations, as necessary • Communicate operational rhythm 	E, F, I		
15. Ensure integration of incident management officials, including on-scene incident and JIC/JIS personnel, into the EOC planning process.	E, F, I		

Emergency Operations Center (EOC) Skillset: Policy and Direction

Task Categories:

Demonstrate an understanding of the authorities, policies, priorities, capabilities, constraints, and limitations of the organization/jurisdiction you represent

Demonstrate an understanding of coordinated response/Unified Command and the roles and responsibilities of the parties involved

Task Category: Demonstrate an understanding of the authorities, policies, priorities, capabilities, constraints, and limitations of the organization/jurisdiction you represent

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Provide guidance on strategic priorities and resource support to incident personnel and stakeholders.	E, F, I		
2. Demonstrate knowledge of your organization's financial and legal regulations and general authorities.	E, F, I, J, T		
3. Demonstrate knowledge of the whole-community concept and of the impacted community's cultural sensitivities.	E, F, I, J, T		
4. Demonstrate awareness of your organization's operational and resource capabilities.	E, F, I, J, T		
5. Request and participate in relevant meetings and briefings.	E, F, I		
6. Work with legal counsel and EOC leadership to ensure informed decision-making.	E, F, I		
7. Authorize protective measures for life and safety, such as curfew and evacuation recommendations, based on legal authorities.	E, F, I		
8. Provide guidance and authorization for information-sharing with external agencies and the public.	E, F, I		
9. Interact with external government contacts, including those at the local, state, tribal, territorial, and/or Federal levels.	E, F, I		
10. Review and approve plans and procedures.	E, F, I		
11. Support the after action review and improvement planning process.	E, F, I		

Task Category: Demonstrate an understanding of coordinated response/Unified Command and the roles and responsibilities of the parties involved

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Authorize external resource requests according to organizational authorities: <ul style="list-style-type: none"> • Memorandums of Understanding (MOU) • Memorandums of Agreement (MOA) • Mutual aid agreements • Declarations 	E, F, I		
13. Understand the roles and relationships of the Policy Group, EOC, and other incident personnel.	E, F, I, T		
14. Demonstrate awareness of the impacted community, including, for example: <ul style="list-style-type: none"> • Rules and regulations • Culture • Demographics 	E, F, I, J, T		
15. Participate in organizational training and exercises.	E, F, I, T		
16. Help establish and communicate policy decisions.	E, F, I		
17. Monitor objectives, strategies, and tactics for the current operational period.	E, F, I		

Emergency Operations Center (EOC) Skillset: Resource Tracking

Task Categories:

Track resources

Task Category: Track resources

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of EOC and field operations resource tracking processes.	E, F, I, T		
2. Monitor and track resources and supporting logistics.	E, F, I		
3. Update requestor on request status, estimated time of arrival, and related logistical details: <ul style="list-style-type: none"> • Verify that provided information meets incident needs 	E, F, I		
4. Establish communication channels to maintain resource status.	E, F, I		
5. Track resources from initial request through: <ul style="list-style-type: none"> • Hand-off to incident, or • Demobilization (for resources that remain under EOC management) 	E, F, I		
6. Anticipate, recognize, plan for, and address resource drawdown levels for resources that remain under EOC management.	E, F, I		
7. Communicate with incident command and EOC stakeholders regarding resource status.	E, F, I		

Emergency Operations Center (EOC) Skillset: Understanding the Resource Requirement

Task Categories:

Understand and validate the resource requirement

Communicate requirement in plain language and use national standards and common terminology

Task Category: Understand and validate the resource requirement

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Communicate with requestor as necessary to understand mission and resource requirements.	E, F, I		
2. Apply awareness of the situation to initially validate resource request and anticipate unrequested resource needs.	E, F, I		

Task Category: Communicate requirement in plain language and use national standards and common terminology

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
3. Work with subject matter experts to describe resource requirements: <ul style="list-style-type: none"> • Scope the request in terms of capability rather than in terms of specific resources • Incorporate national resource typing definitions, as available • Demonstrate awareness of national standards and common terminology for personnel and resources • Verify request details and address missing information 	E, F, I		
4. Implement a resource management process, including using forms, following timelines, and identifying responsible parties: <ul style="list-style-type: none"> • Use national standards and common terminology to promote ease of use 	E, F, I		

Emergency Operations Center (EOC) Skillset: Situational Awareness

Task Categories:

Gather data and information

Analyze data and information

Disseminate information

Task Category: Gather data and information

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Collect and monitor data and information: <ul style="list-style-type: none"> • Sources include Incident Action Plan (IAP), on-scene incident reports, EOC personnel, National Weather Service, jurisdictional liaisons, fusion centers, traditional media, social media, and others • Content includes demographic, damage assessment, infrastructure, supply chain, and geographic data and information 	E, F, I, J		
2. Coordinate information with EOC public affairs personnel and the Joint Information Center (JIC)/Joint Information System (JIS): <ul style="list-style-type: none"> • Receive information from JIC/JIS • Provide information to JIC/JIS 	E, F, I		
3. Coordinate with EOC personnel to gather information.	E, F, I		

Task Category: Analyze data and information

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
4. Establish and implement processes for estimating cascading effects of action or inaction: <ul style="list-style-type: none"> • Evaluate potential consequences and mitigation actions • Identify trends • Engage technical specialists 	E, F, I		
5. Use demographic information to inform analysis: <ul style="list-style-type: none"> • Cultural diversity • Potential vulnerabilities • Damage assessment • Specific service needs, such as: <ul style="list-style-type: none"> ○ Individuals with disabilities and other access and functional needs ○ Individuals with critical transportation needs 	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
6. Analyze information: <ul style="list-style-type: none"> Establish and implement procedures for verifying, organizing, prioritizing, and tracking information Convert raw data into information Identify and address misinformation Verify and analyze input for critical information Clarify incomplete information Identify incident-specific essential elements of information and critical information requests 	E, F, I		
7. Recognize incident-specific critical information to be disseminated immediately.	E, F, I		
8. Prepare situational briefings, reports, displays, briefing tools, and other information products.	E, F, I		

Task Category: Disseminate information

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
9. Establish and implement a process for developing and disseminating situational information at regular intervals: <ul style="list-style-type: none"> Obtain approval for distribution in accordance with policies and procedures Determine distribution lists Determine methods for distribution 	E, F, I		
10. Follow processes for identifying, verifying, and disseminating critical information: <ul style="list-style-type: none"> Coordinate with public affairs to disseminate information externally 	E, F, I		
11. Display within the EOC situational information and data about significant events.	E, F, I		
12. Use visualizations such as graphs, photographs, and maps to graphically depict information.	E, F, I		
13. Use mapping/geospatial data and sources, including Geographic Information Systems, web-based maps, and paper maps.	E, F, I, J		
14. Present and distribute situational briefings, reports, displays, briefing tools, and other information products.	E, F, I		
15. Ensure proper security when sharing sensitive, classified, or protected information.	E, F, I		

Emergency Operations Center (EOC) Skillset: Safety Advising

Task Categories:

Promote the safety of EOC personnel

Task Category: Promote the safety of EOC personnel

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Monitor weather and other external conditions that could affect EOC facilities and the availability of EOC personnel, and communicate protective actions.	E, F, I, J		
2. Communicate and support relevant health and safety requirements and procedures: <ul style="list-style-type: none"> • Brief EOC personnel on emergency procedures and safety guidelines • Spot-check operations to ensure compliance with safety requirements • Address EOC safety hazards and implement mitigation strategies 	E, F, I		
3. Develop and provide facility safety plan and briefing: <ul style="list-style-type: none"> • Communicate locations of automated external defibrillators (AED), fire extinguishers, evacuation routes, and shelter-in-place areas 	E, F, I, J		
4. Identify and inform EOC personnel about mental health resources.	E, F, I, J		

Emergency Operations Center (EOC) Skillset: Recovery Coordination

Task Categories:

Understand the complexities of recovery

Demonstrate an understanding of community impacts

Prepare for long-term recovery

Task Category: Understand the complexities of recovery

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of short-term, intermediate, and long-term recovery.	E, F, I, J, T		
2. Demonstrate knowledge of recovery guidance at the Federal, state, local, nongovernmental, and private-sector partner levels, including: <ul style="list-style-type: none"> • National Disaster Recovery Framework (NDRF) • National Mitigation Framework 	E, F, I, J, T		
3. Demonstrate understanding of interdependencies in recovery missions (such as how housing recovery affects economic recovery) and opportunities for coordination, such as priorities identified in: <ul style="list-style-type: none"> • Community hazard mitigation plan • Community master/comprehensive plan • Other applicable organizational plans 	E, F, I, J, T		
4. Demonstrate knowledge of eligibility requirements and opportunities related to available Federal, state, local, philanthropic, nongovernmental, and private-sector partner funding sources: <ul style="list-style-type: none"> • See recovery.gov for examples 	E, F, I, J, T		
5. Demonstrate understanding of mitigation and resilience.	E, F, I, J, T		

Task Category: Demonstrate an understanding of community impacts

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
6. Demonstrate knowledge of community demographics, culture, needs, and capacities.	E, F, I, J, T		
7. Demonstrate knowledge of the damage assessment process: <ul style="list-style-type: none"> • Understand information needs during short-term and long-term recovery 	E, F, I, J, T		
8. Engage and coordinate with the private sector and nongovernmental organizations (NGO), including voluntary and philanthropic organizations, to support recovery.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
9. Demonstrate understanding of: <ul style="list-style-type: none"> • Critical infrastructure interdependencies • Potential impacts on the jurisdiction • Potential effects of prolonged service interruptions • Service restoration timelines 	E, F, I, T		
10. Demonstrate knowledge of economic recovery drivers for the community.	E, F, I, J, T		
11. Demonstrate knowledge of the whole community and any cultural sensitivities related to recovery objectives: <ul style="list-style-type: none"> • Identify potential economic, cultural, and environmental impacts of implementing recovery plans 	E, F, I, T		

Task Category: Prepare for long-term recovery

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Support activities that promote proactive community engagement, public participation, and public awareness of short-term, intermediate, and long-term recovery and resilience, such as: <ul style="list-style-type: none"> • Memorials, vigils, and emotional/mental health campaigns • Activities that acknowledge cultural, religious, and traditional diversity in the community • Collections of supplies and monetary donations • Efforts of Voluntary Organizations Active in Disaster (VOAD) 	E, F, I		
13. Prepare disaster recovery plans (such as an overall plan or Recovery Support Function-specific plans), including recovery roles and responsibilities: <ul style="list-style-type: none"> • Prioritize recovery activities based on community needs • Consider funding availability, eligibility requirements, and interdependencies • Incorporate resilience considerations 	E, F, I, J		
14. Coordinate with EOC public affairs staff to disseminate recovery-related public information: <ul style="list-style-type: none"> • Conduct outreach about Disaster Recovery Centers (DRC) and available Federal and state resources • Provide information to protect consumers from disreputable, opportunistic contractors • Combat misinformation 	E, F, I		
15. Capture and communicate economic impacts and implications, including unmet community needs, to state, local, tribal, territorial, and/or Federal leadership.	E, F, I		
16. Work with EOC personnel before, during, and after the transition from response to recovery: <ul style="list-style-type: none"> • Disseminate recovery information and address misinformation 	E, F, I,		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
17. Advocate for recovery considerations: <ul style="list-style-type: none">• Provide briefings and recommendations to the Policy Group• Propose courses of action to avoid adverse effects on long-term recovery	E, F, I		
18. Implement pre- and post-disaster mitigation and recovery plans.	E, F, I		

Evaluation Record Form

CANDIDATE NAME:
CANDIDATE POSITION:
Evaluation Record Number:
Evaluator's name:
Incident/office title and agency:
Evaluator's home jurisdiction address and phone:
Name and location of incident or simulation/exercise or Job Function:
Incident kind:
Number and kind of resources:
Evaluation period:
Position type:
Recommendation: The above named candidate performed the initialed and dated tasks under my supervision. I recommend the following for this candidate's further development: <input type="checkbox"/> The candidate has successfully performed all required tasks for the position. The AHJ should consider the individual for certification. <input type="checkbox"/> The candidate could not complete certain tasks or needs additional guidance. See comments below. <input type="checkbox"/> Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation. <input type="checkbox"/> The candidate is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a candidate for this position.
Additional recommendations/comments:
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Evaluator's initials:
Evaluator's relevant qualification:

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